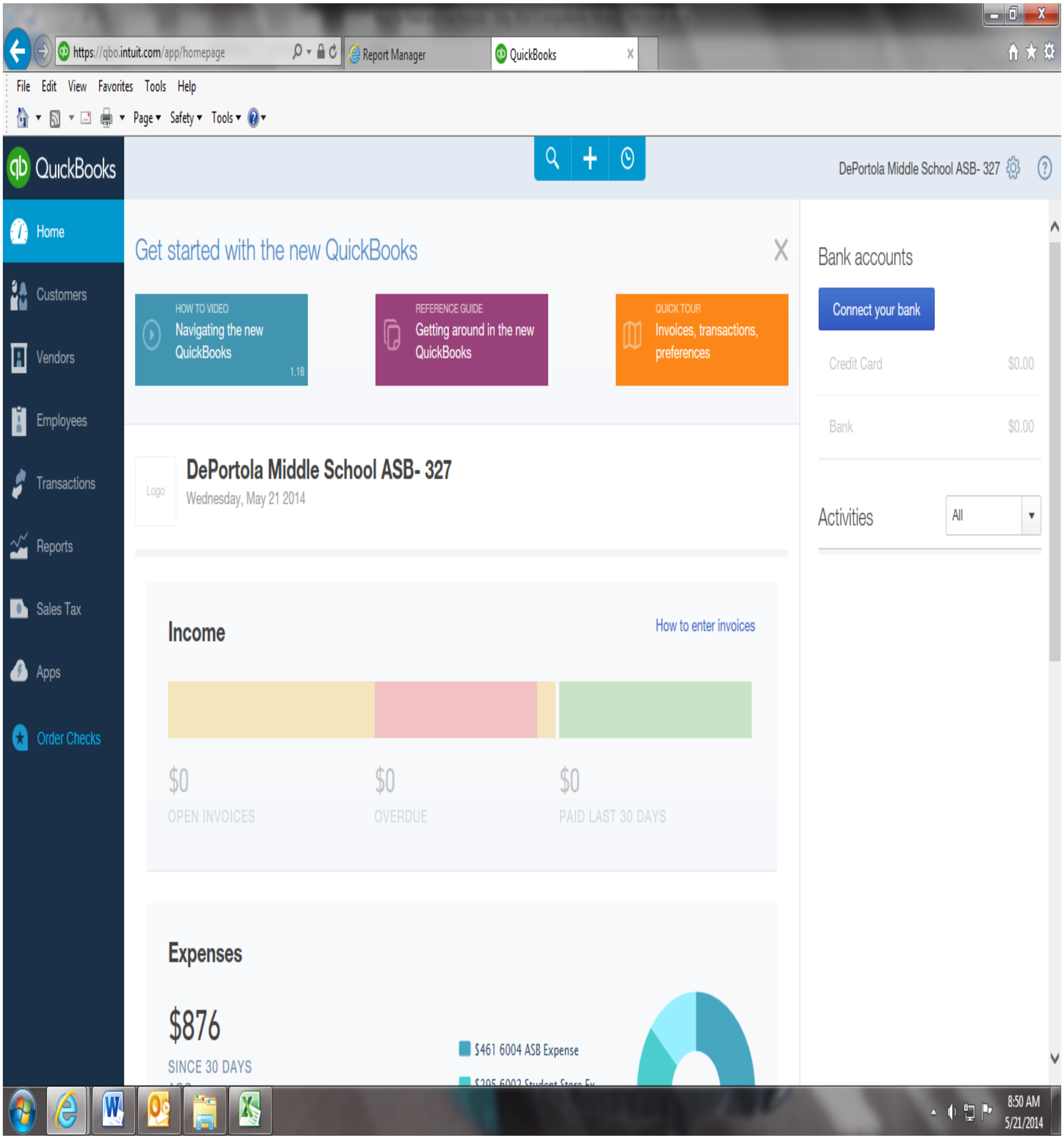
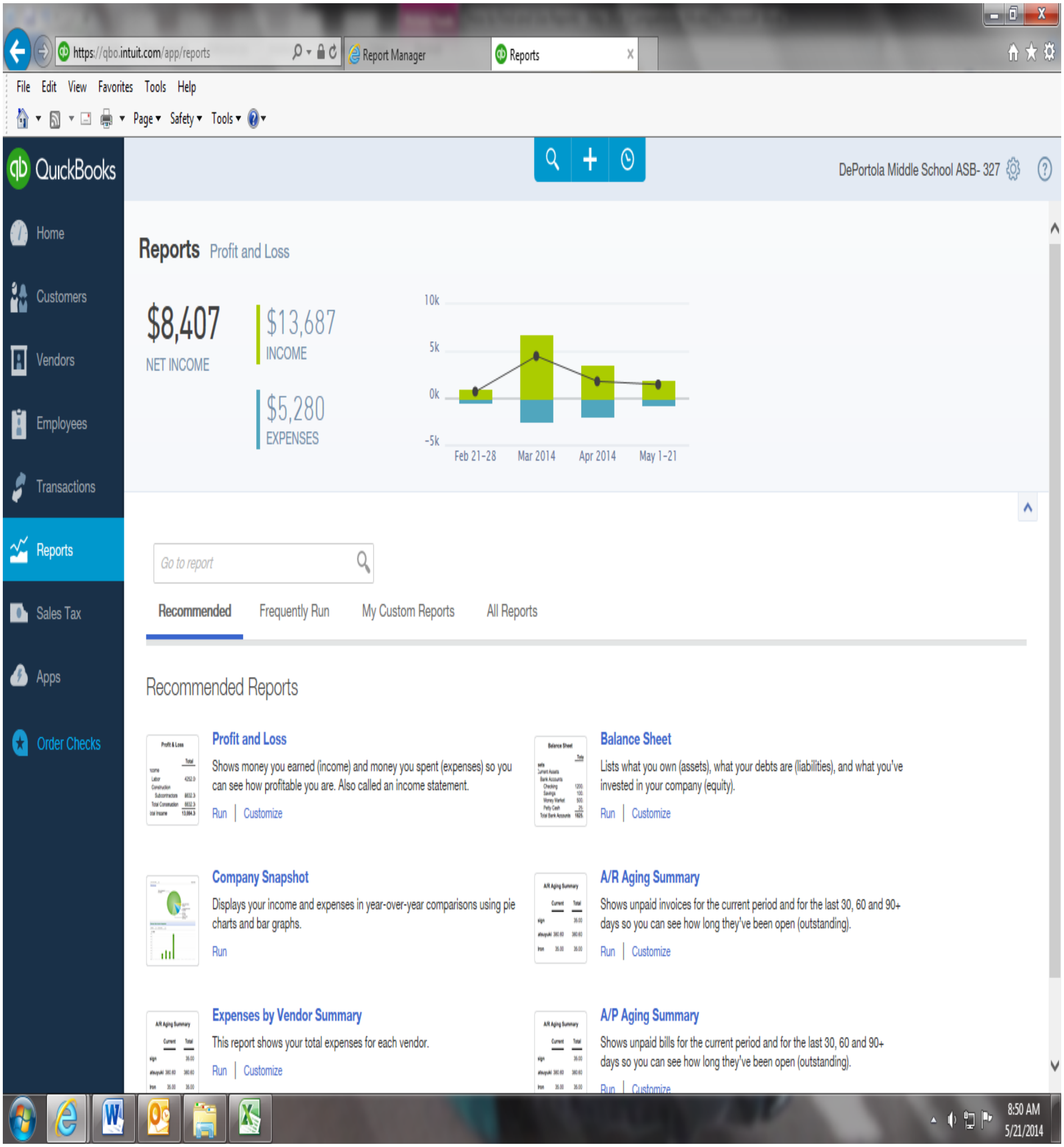
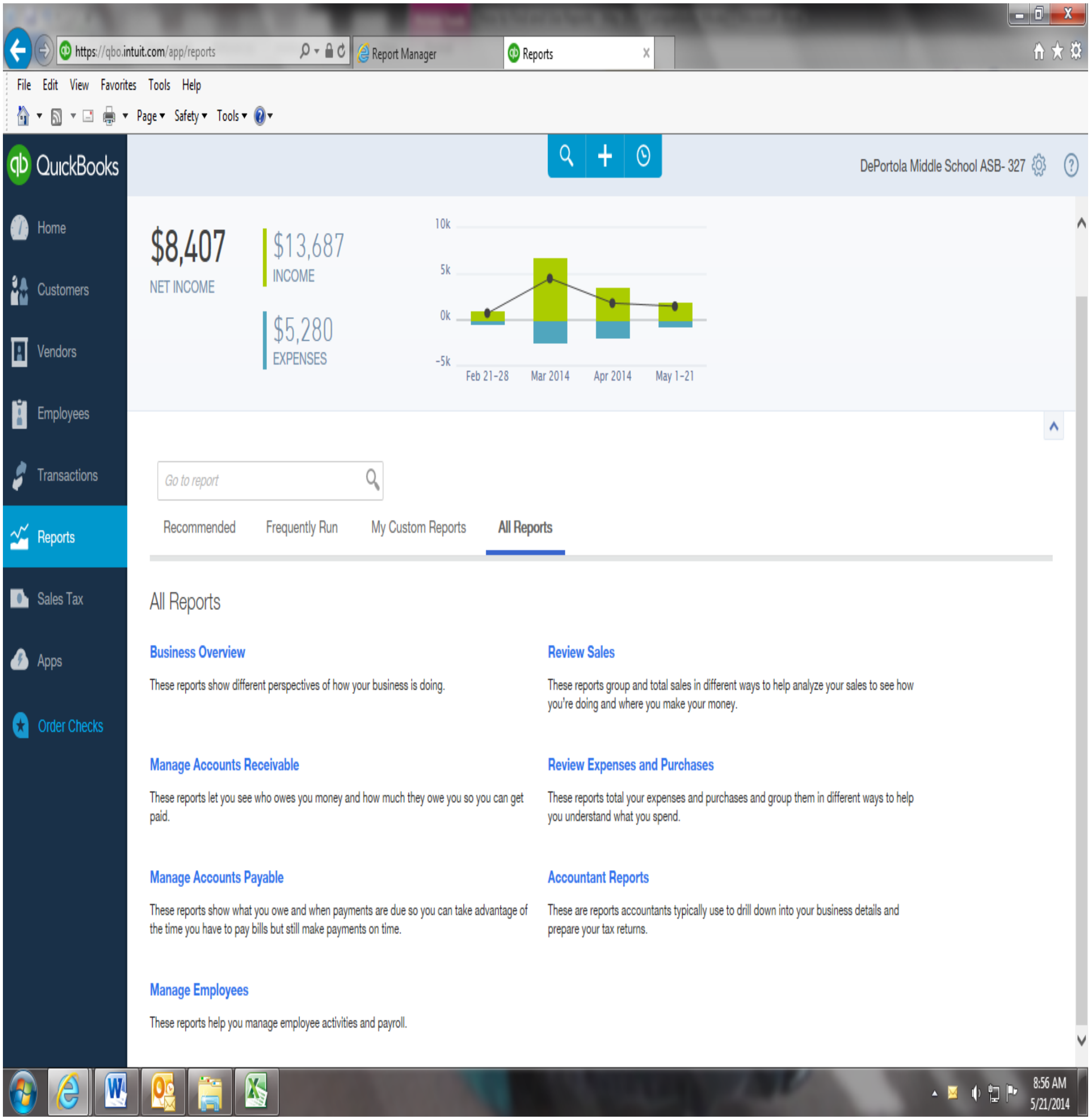
**How to Find and Use Reports.**



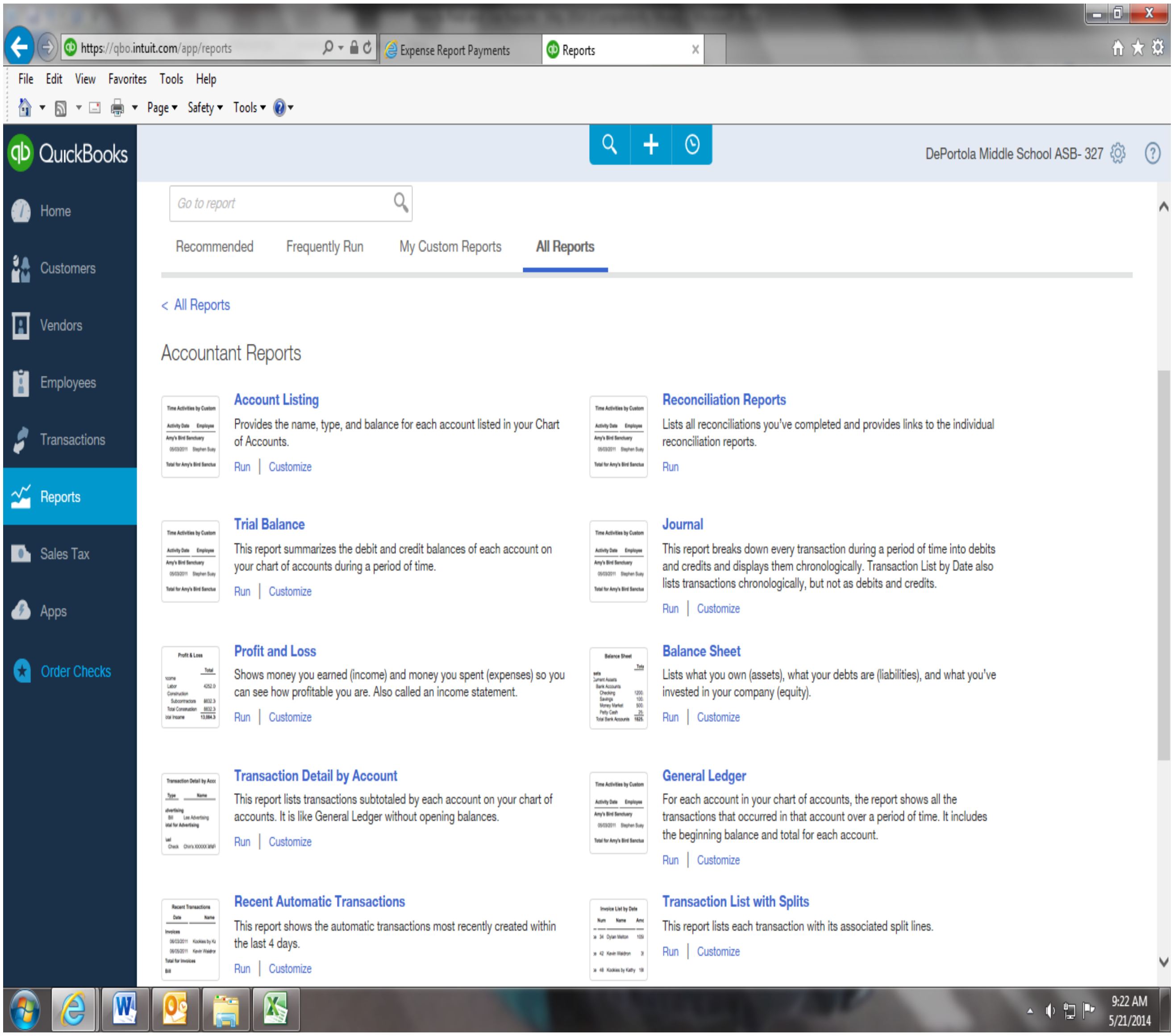

1. As you can see, there are many choices from which to choose. We will select the ‘reports’ option listed on the left-hand side of this screen.
2. Choosing ‘report list’ will take us to the following screen.



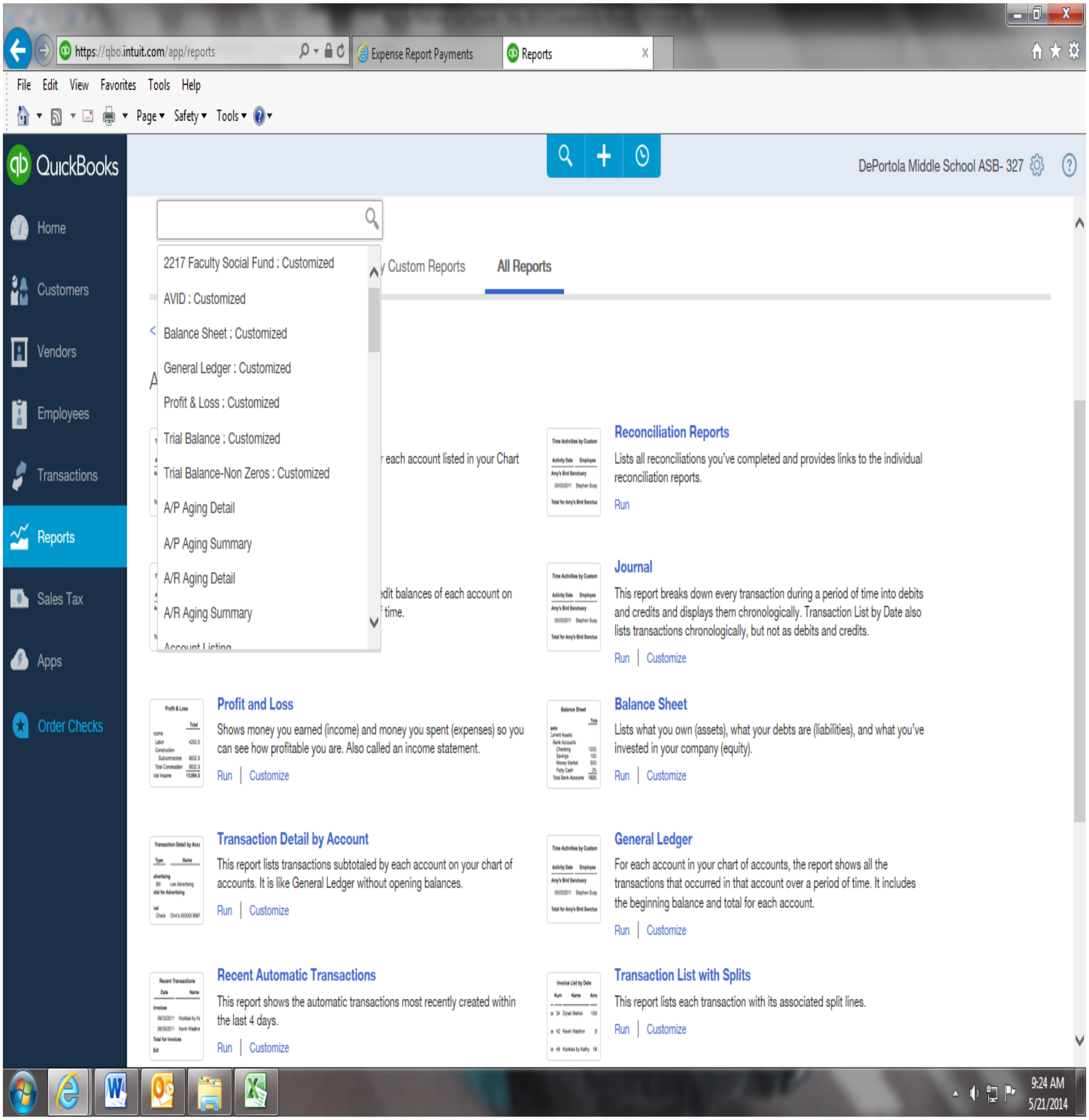

3. If you choose all reports, then it will take you to another screen which will show you the reports that QuickBooks considers to be standard reports.



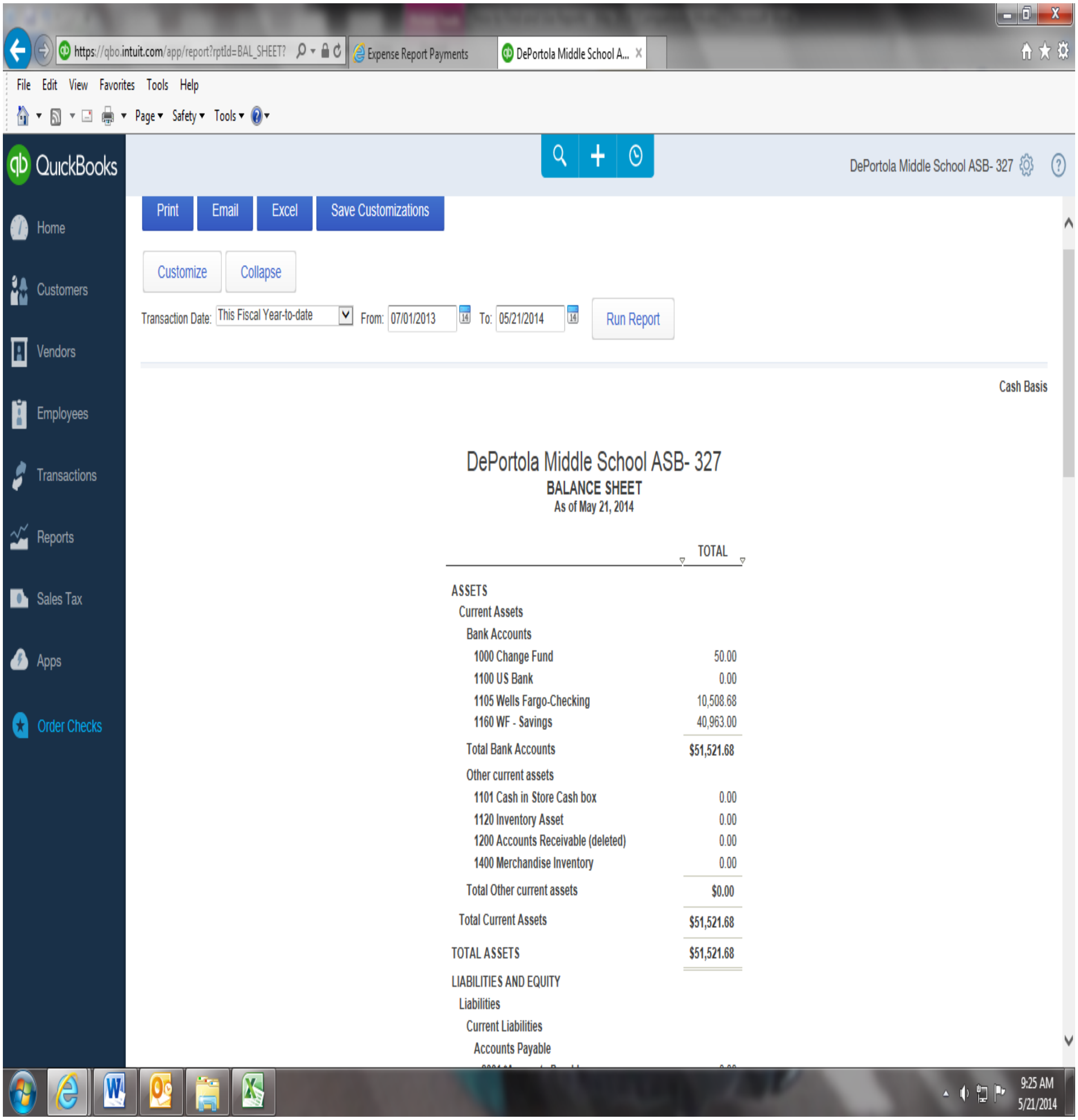

4. Let’s choose “Accountant Reports” and we will find the following reports contained within this group.



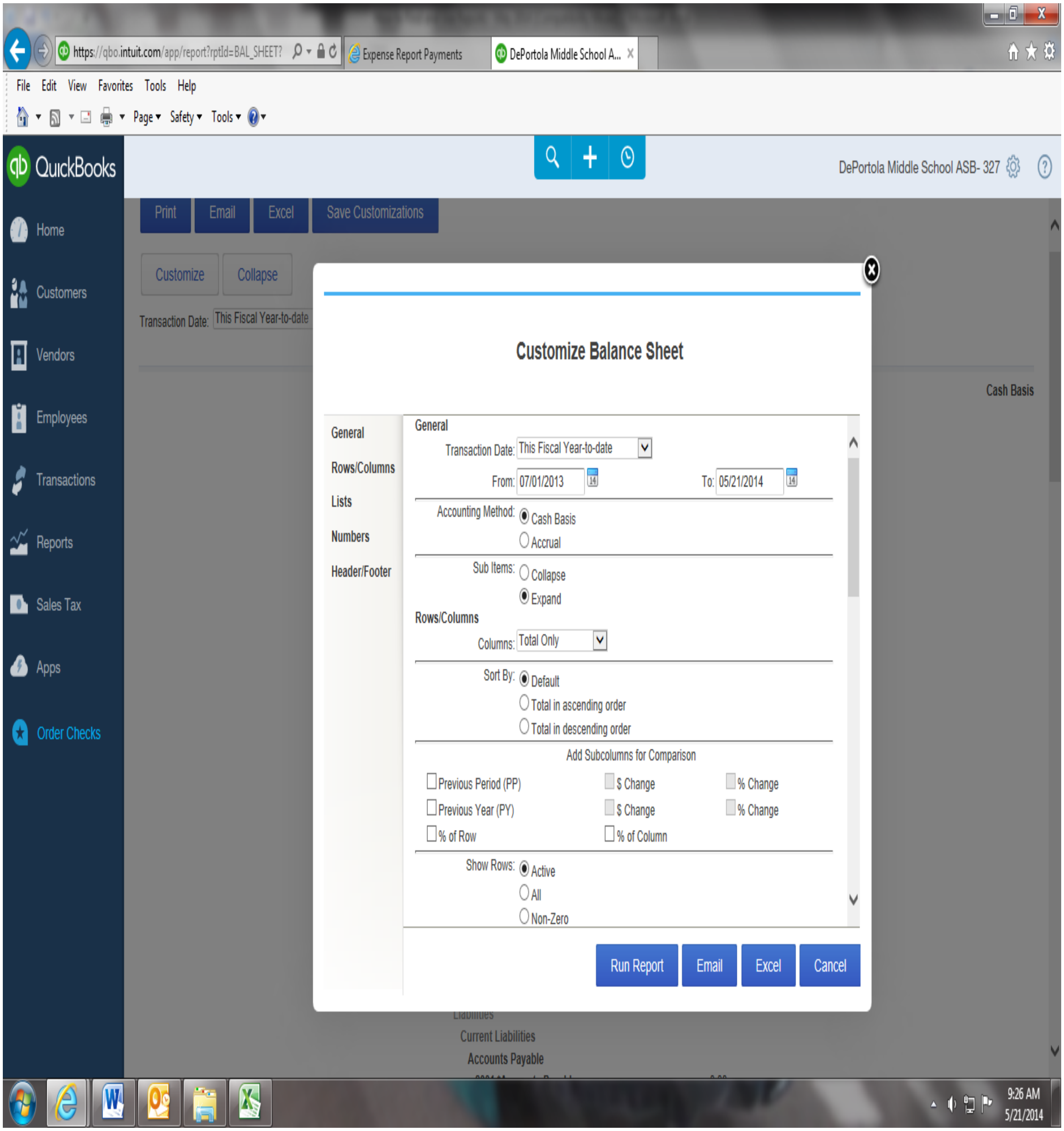

5. If the report you are looking for is not listed, then you can click the spyglass for a more detailed listing of available reports from which you can choose. See the following screen shot for what appears for this site.



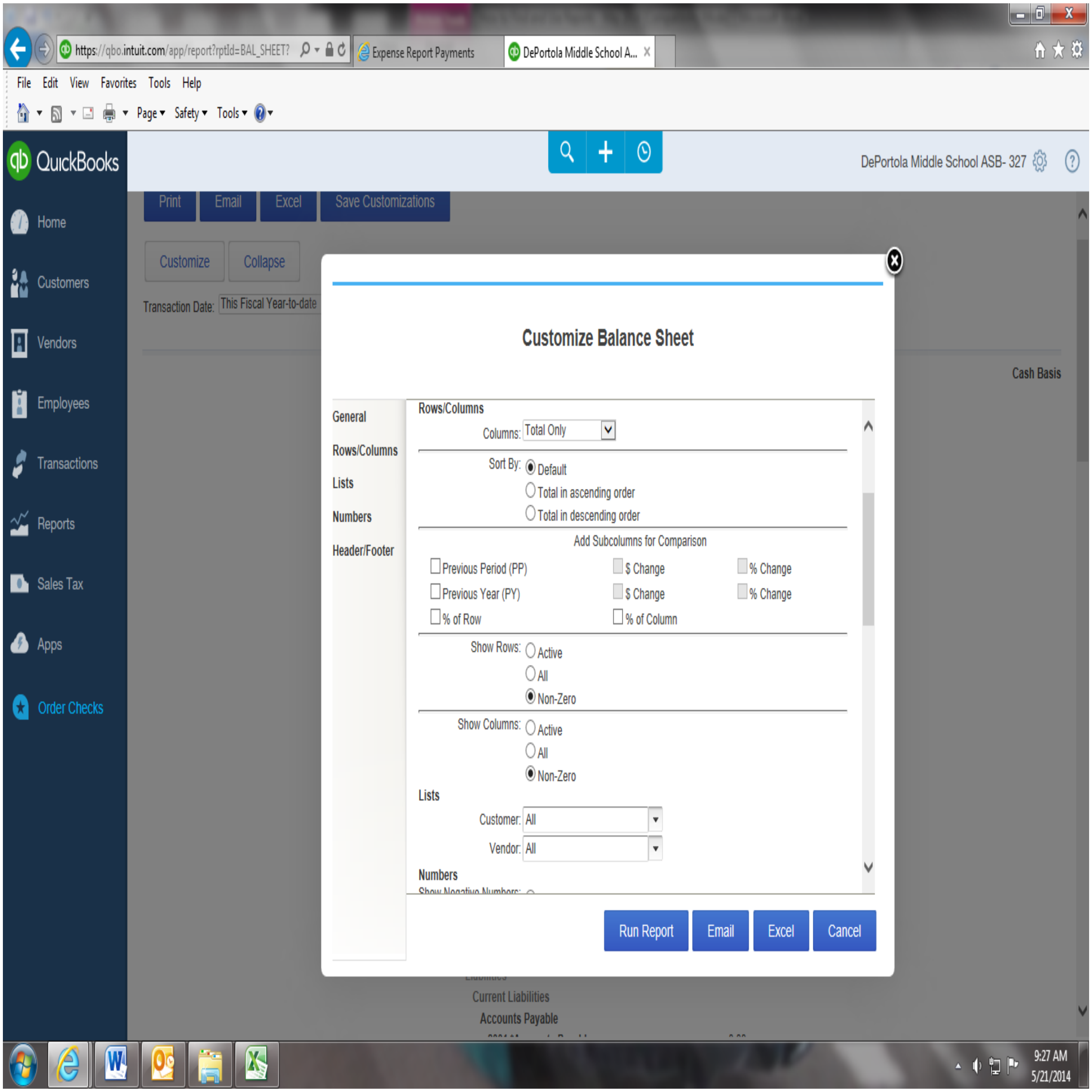

6. The balance sheet was selected.



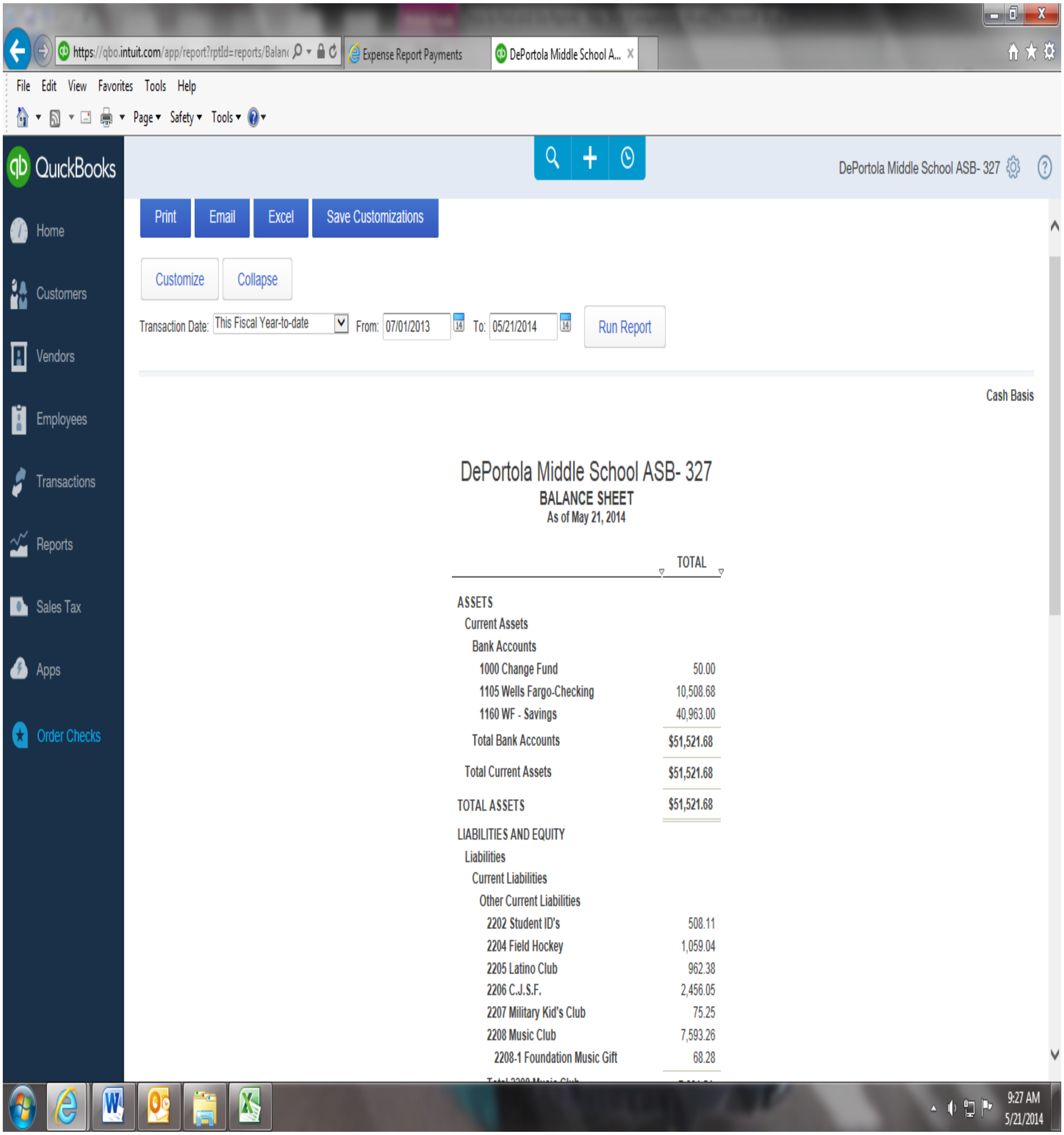

7. Notice that US Bank shows a zero dollar amount. We only want to show accounts that have money in them.
8. We will need to customize our report. Select the 'customize' box in the upper left-hand side of the screen.



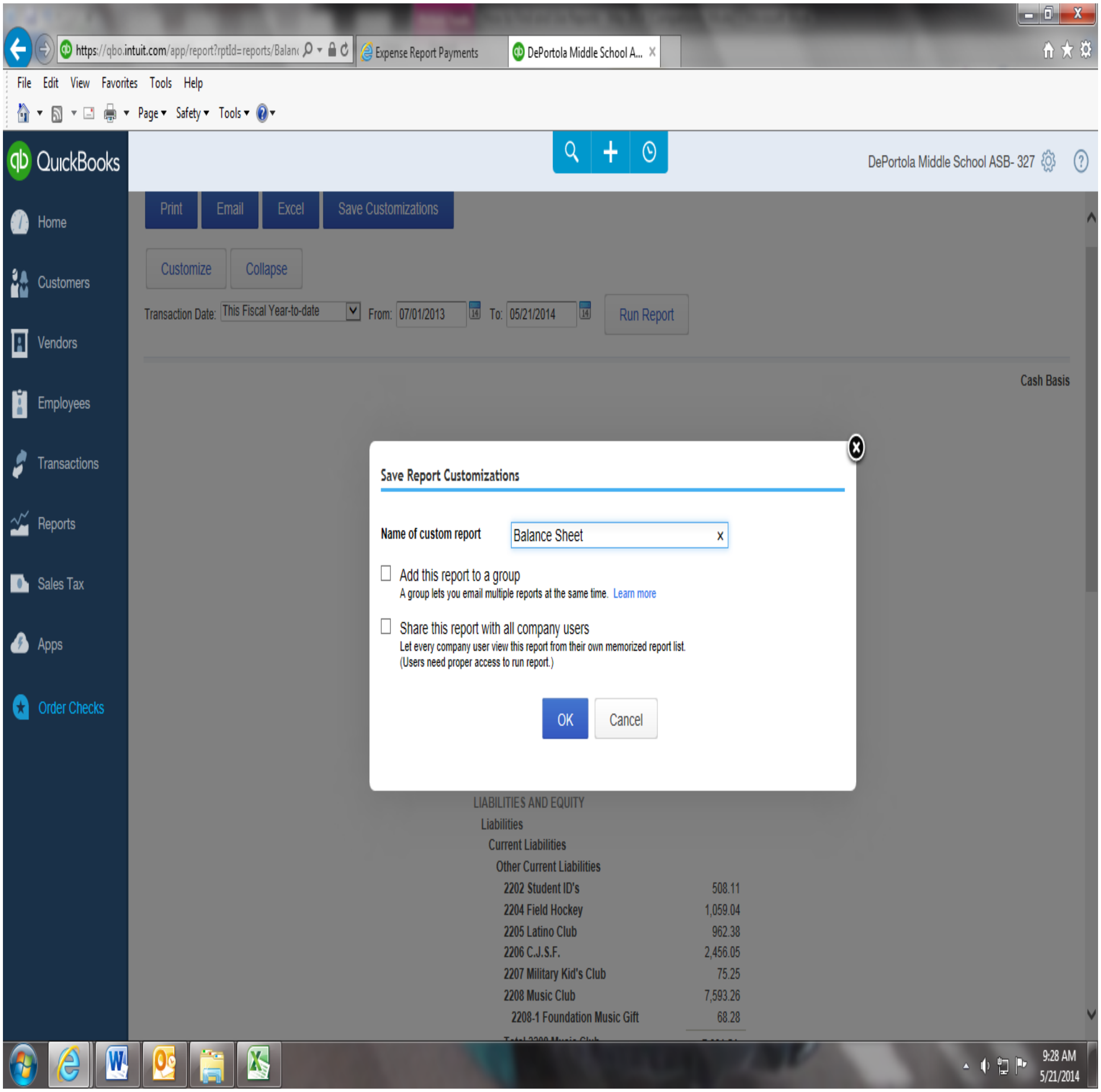

9. Another screen will appear. I have chosen rows/columns to change.
10. I will then be taken to another screen where I will make choices to exclude non-zero accounts.




11. Once I have made these choices, then I can choose 'run report.' I will then have a report that shows only those accounts with money in them.




12. Notice that US bank is now missing from my balance sheet.




13. I can add this customized report to the memorized reports if I so choose.
14. Remember that these ‘customized’ reports are available only to your site. Each site will need to make its own customized report.

# Customize reports

**Note:** This information does not apply to payroll reports.

To customize a report to show exactly what you want to see:

1. Open the report you want (or a similar report) and click **Customize**.
2. Change the settings in the Customize window and then click **Run Report**.

For example, by default, each report shows data as of today's date. To limit the report to a different set of dates, choose a **Transaction Date** range above the report or in the Customize window.

The Customize window contains many settings that help you limit the report so that it shows only what you want to see. To do further customization, export the report to Excel and manipulate it there.

If you want to save your customized report to access later, memorize it.

**Change how a report looks when printed**

To change a report's appearance before you print, you can:

- Resize columns in the report. If some columns don't print, see Tips for printing wide reports.
- Export a report or list to Microsoft Excel. In Excel, you can control all the formatting (fonts, headers and footers, columns, spacing).